Statewide Technology Planning in Legal Services:
Turns Out It *Is* Rocket Science

About the Author

Gabrielle Hammond has been a manager in legal services for nine years. This means, she's worn every hat from project manager, fundraiser, supervisor, advocate, to even, consultant. Currently, Gabrielle Hammond directs the National Technology Assistance Project through the Legal Aid Society of Orange County. NTAP was funded by Legal Services Corporation in 2001. For more information on NTAP and Gabrielle Hammond, please visit NTAP's site, located conveniently with LStech.Org: `http://lstech.org/ntap`.

Acknowledgements

This manual is truly a living testament to a collective effort. And, since it only took seven short years from conception to final product to produce, it is also a working symbol of the challenges of planning and manuals. But, what you have before you is completed, and we think, even helpful. We have many to thank for that.

We would not even have a manual to put on the shelf if it weren't for **Glenn Rawdon** and **Steve Gray**. Back when there was idealism and the word "manual" really meant something more like "outline," Glenn and Steve harmlessly conceived of a "manual" that would help programs save money on planning consultants and better understand the value of technology in legal services. Their initial thoughts, brainstorms, and discussion points were used years later when the planning manual was resuscitated into its new form. Steve Gray, in particular, is recognized for his first attempts to put this together, just for the passion of doing so. The final product before you borrows many of his witty remarks initially found on dusty outlines.

A team of NTAP consultants, bright-eyed and excited to bring the tech community together, met on the Statewide Technology Planning Manual (STPM) years ago in its infancy. This manual reflects their initial thoughts and planning efforts. In particular, **Ed Marks, Rob Davies**, and **Bill Yarian** are commended for their input in those early stages. Ed Marks, in particular, invested his time in providing key input and guidance throughout the development, and was the co-editor on the final version.

The Legal Services Corporation officially funded this effort last year through NTAP. The manual definitely would not have been revived without the carrot of funding.

NTAP found valuable online resources on general technology planning and lifted heavily from these sources. Namely, they include: **TechSoup**, an online resource for those doing technology in nonprofits (`http://www.techsoup.org`) and the **Minnesota Schools and Library Systems**, which conducted their own state technology planning process and included a website of resource materials (`http://informns.k12.mn.us/techplan`). These sources provided material that you'll see interspersed throughout the manual and appendices.

Lastly, we interviewed many persons and programs across the country to gain insight on statewide technology planning. **Mindy Cherng**, the Training Coordinator at NTAP, conducted and coordinated these extensive interviews. Most importantly, NTAP sincerely appreciates the hours that the following staff and managers spent in interviews to provide information that fleshed out the manual before you.

- **Ray Bollinger**, Legal Aid Society of East Tennessee
- **Angela Campbell**, Kentucky Legal Aid
- **Brenda Combs**, Northern Kentucky Legal Aid Society
- **Jim Deming**, Tennessee Alliance for Legal Services
- **Clarence Franklin**, North Mississippi Rural Services
- **Tim Kelso**, Nebraska Legal Services
- **Nancy Kleeman**, Minnesota State Bar Association
- **Joan Kleinberg**, Northwest Justice Project
- **Ed Marks**, Advocates for Basic Legal Equality, Inc.
- **Maureen O'Connell**, Minnesota Legal Services Coalition
- **James Spencer**, Legal Services of Eastern Missouri
- **Rick Winder**, Michigan State Bar Foundation

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Purpose and Format of Manual

While you could hire an outside consultant to help you devise your plan, it is hoped that this manual will give you enough information to do this work yourselves. The purpose of this manual is to give programs a practical guide to set up a Statewide Plan for Technology, Tech Support, and Training. It's that simple. It doesn't pretend to be an exhaustive manual on the complexities of planning or technology.

This manual tries to give you not just standard, consultant-like information about statewide technology planning, but also pearls of wisdom collected from interviews with twelve different legal aid programs that are in some stage of statewide technology planning. These programs range from multi-program to one-program states. Their planning efforts were motivated by factors that ranged from merger-driven to self-reflection. The appendices provide you with samples of plans, surveys, and other planning tools and suggestions – both from sources within and outside of legal services.

Given our topic at-hand, this manual has a high probability of landing on a shelf. You'll notice in the format of the manual that we've chosen an informal approach. You might see a few hanging prepositions (for the few lawyers and techies that actually claim to notice), but our goal was readability. Also, you'll notice we have sidebars and text set-off from the main sections in quotation marks that are unattributed. We didn't make these up. (Well, we might have made them a bit more readable, and deleted the "um's" that might have been in the originals.) But, these represent a distillation of

someone's comments we received from any of the interviews we did on statewide technology planning. Our omission of source means no offense. Simply, we wanted the reader to focus on the pearl of wisdom, and not track which programs might have been a little more dissatisfied or satisfied with planning than others. We have tried our hardest to present themes in easy-speak and with as much comedy as techies, planners, and legal services' staff can muster. Enjoy.

We're Lawyers, Not Techies: Why Plan for Technology?

"*Whether you're an inspired executive director, technology staffer or an 'accidental techie', you're probably struggling to convince yourself, your board, your staff or co-workers that integrating technology into the workplace will be worth the time, attention and expense. Effectively communicating the total value of technology will help pave the way for strategic purchasing and decision-making.*"
– Marc Osten, Summit Collaborative.

Put simply, technology is uniquely positioned to harness the power of information and maximize the power of partnerships. **Information** and **partnerships** are necessary tools to protect rights, lead our clients to economic opportunities, resolve injustices, and link clients to other services that can help lift them from poverty's cycle.

In its utopia, technology offers an opportunity to bridge divides (social, geographical, and economic), support and strengthen partnerships, and deliver timely, accurate information or services easily. Sound technology management leads to greater productivity, increased staff morale, and improved service

to clients through having machines that work, networks that give access to information, and applications that are appropriate for an organization's mission. Technology innovations also transform the power of individuals by empowering clients or advocates outside of your individual office with strategies and tools for advocacy. Information can transform organizations by giving them tools to understand the environment they're working in, measure the effectiveness of their actions, and counter opposing information from other groups and policy makers.

> ### Plan Like Lawyers, Not Techies:
>
> *A technology plan forces a program or group of programs to think through what you need and how to meet those needs. Planning helps ensure technology decisions are driven by your program's or your state planning body's objectives rather than vendors or spendthrift tech-geeks.*

Conversely, mismanaged technology and poor decisions to implement it can drain large sums of resources and staff morale. By way of example, according to a recent e-article on *TechSoup,* a Boston-based non-profit arts program reported an estimated loss of 2,300 hours per year due to trouble-shooting software, hardware problems, staff frustration with technology, and attempts to recover lost information. (See: *So, What's the Full Value of Technology, September 26, 2001; TechSoup).*

If you need more information on the role of technology within legal services, there are several articles for you referenced in the appendices, for example: *Future of Technology in Legal Services,* co-authored by Gabrielle Hammond of NTAP and Ellis Jacobs of Dayton Legal Aid and, especially for those new to the poverty law technology arena, see: *Legal Aid Technology*

for Newbies (`http://tinyurl.com/2gsl5`), by Steve Gray.

The Value of a <u>Written</u> Technology Plan

A *Written* Plan

Just in case there is a free-standing hippie out there (and there are a few still left in legal services who haven't become directors) who doesn't want to be constrained by a *written* plan, here are a few obvious justifications for an official, final document:

- Accountability
- Funders need them
- What will your state do if your entire planning group were hit by a bus?

But, don't get us wrong, just because a plan is written doesn't mean it is useful. A technology plan has value only if it helps you and your statewide community meet larger goals and objectives to improving the lives and protecting the rights of your clients. ***Successful technology planning is integrated with, and driven by, strategic planning and your vision.***

To help your planning be effective, a technology plan should be reviewed and created by questions that help your committee decipher how to meet objectives that improve efficiency, expand services, support partnerships, and maximize information currently available.

A written plan that is accountable to your delivery goals can be the missing ingredient that can help the state planning body or your individual program to:

- **Obtain funding**. Funders will be much more likely to give money for technology if you can show them a technology plan.

- **Further your mission, objectives, and collaborations.** The technology planning process can expand your horizons and help you see new ways in which technology can further your mission.

- **Purchase the right equipment.** Purchasing hardware, software and networking equipment can be overwhelming. If you don't plan, it's easy to end up with something that is way too complicated or doesn't do what you need it to. There's no substitute for thinking through your goals and researching possible solutions.

- **Save money.**

- **Avoid crisis and reduce risks.** Bad technology decisions can leave you suffering for years. A faulty system can send your stress level through the roof and make you lose crucial data and capabilities.

- **Streamline and use staff time more effectively**.

- **Reduce risks related to technology purchases and assist in decision-making.**

Words of Wisdom Before You Begin to Plan for Technology

Let's not lie. We're lawyers or we're techies or we're just crazy to work at legal aid. But we're definitely not planners. It's a unique skill and challenge even under the best circumstances. It takes time, leadership, facilitation, and commitment from all involved to really look at what things work, what things don't, and how to put together something that isn't bogged down by process, politics, or verbosity.

Many of us can drum up excitement when we are driving our planning efforts. But, many times this is not the case. We're forced to plan – by funders, by partners, by crises, and that makes it less effective.

The good news is there is help and there are pioneers. Many of us who experienced bad planning efforts survived and even *remained in legal services.* No matter how great or poor your planning efforts are before you, someone's been there before. Non-profits around the country and several legal aid-led efforts have successfully produced working and useful technology plans. NTAP interviewed programs who loved and hated the planning process; programs who self-described planning as difficult to enjoyable. This manual compiles the wisdom of these planning forerunners, and also pulls in the solid information gleaned from the NPO technology planning materials we poured over. Their expertise and the steps outlined below can help ensure an effective technology plan.

What Drives your Planning?

Technology should not drive the decision making. Rather, decisions should be made based on the goals and needs you have outlined to improve the delivery of legal services.

Overview of Tech Planning Process: A Checklist for Success

These are general guidelines to tech planning, and they have helped legal aid programs and many other non-profit planning efforts. Your team will have to be creative and tailor this checklist into steps for your needs, re-order what is essential, and plot your own course.

1. **Establish a strong technology planning group.**

2. **Decide staffing and budget for the planning efforts.**

3. **Define the vision and mission of the group.**

4. **Get buy-in.**

5. **Define your needs.**

6. **Explore solutions.**

7. **Write the plan.**

8. **Re-circle the wagons**

9. **Get funding.**

10. **Implement the plan.**

11. **Evaluate the plan.**

Before You Begin

Technology planning to create statewide tech support and training requires some forethought. Now, for those of us that are worn by process, this is not an optional step. It's like going to the grocery store to get the ingredients to bake something you've not baked before. You could just launch ahead to the store and hope you remember everything. Or, you could make a quick list. Making a grocery list for a complicated baking experiment is "planning for the plan." Before you begin the actual work of planning, you will need to take a little time to think about the mechanics of how you'll plan. Consider:

- Who will be included in the planning process?

- Who ultimately makes decisions or what body of people?

- How will communication flow between the decision-makers and the planners, if they are not the same people

- What is the timeline to plan?

- How will the planning effort be staffed?

- How will it be funded?

- What is the objective of planning? (For example, is it to: create state support for technology among all the legal aid programs? Create a long-term approach for using technology to help clients access justice? Create a short and mid-range approach to integrating technologies that help staff and management of cases be efficient and promote partnerships? Bring programs together in a merger process?)

- Where does future planning fit into this process?

You don't have to have specific answers for all of these; a group of people can help you come up with them. But, these questions will need answers before the planning process is successful.

Generally, most programs want to know how much it will cost and how long it will take. It depends on your group, the pressures placed on your program to produce a plan, the overarching goals of planning, and the time and staffing allotted to the process. Some programs interviewed had to move quickly on an externally-generated timeline in order to coincide with merger processes. Some programs

> **Pearl of Wisdom:**
>
> *"We can't say this enough: communication has to flow from the decision-makers to the planners regularly. If the directors are not involved directly and are not bought in to the plan along the way, the planners may build something brilliant, only to see it gutted or rejected. This can stall the process and increase frustration, things we generally try to avoid if we want to retain staff."*

planned slowly over time, parallel to access to justice planning initiatives. All of these politics and issues affect cost and timing.

A Word of Advice on Stalling: The problem with technology is you don't have forever. Bureaucratic committees and groups afraid of moving ahead on technology decisions will finally agree on a plan that now is outdated – both to the needs it was trying to solve and the technologies available to implement.

The Technology Planning Body

The most important element in the success of your planning effort is the planning group. The right group can ensure support and funding for the plan.

Who's the Group?

A technology planning steering committee is charged with developing the plan and outlining how it will be implemented. This group should have some global representation from your justice community, programs that service your clients, and partners who can benefit from technology sharing. Some programs suggest making a list of whom you would like to see develop a vision. If you don't have specific names, list job titles: i.e. executive director of IOLTA program,

Survey Says…On How Long it Takes to Plan?

- *"It took our program two years."*
- *"Six months."*
- *"I think we're talking about a year or two to let ideas gel."*
- *"30 days…but that was a committee of one."*

What Does This Mean?

Two things are clear from the interviews: The plan itself only takes two to six months to actually write and get feedback on. The planning, getting buy-in, and the politics of planning are variables that will lengthen the process by a range of four to 24 months.

IT professors from local university, etc. Generally, planning efforts should include:

- Legal aid programs in the state,
- Pro bono programs,
- Courts or Administrative Office of the Courts,
- Public Defender Groups,
- State Bar,
- Other stakeholders in the community who can share in technology toward similar missions: law schools, library, community colleges, and universities,
- Other stakeholders that help clients or refer clients: other social services agencies, shelters, senior organizations, and state referral programs like 211, and
- IOLTA funders or other foundation representatives,

Types of People on the Committee?

The representation of staff positions within the group should also be diverse and include people who write checks, use technology, represent clients, and understand the overall vision.

Programs recommend a balanced group of: executive directors, advocates, administrators, managers, intake workers, non-techies, a tech-geek and maybe a naysayer for kicks. See Sidebar section and

Principals section for more discussion on roles of people that should be included in a planning group.

The Principals vs. The Constituency

Let's talk about size of the group and strategies for balancing productivity and representation. If every relevant program and every staff position were represented from your state, the group would be too big to be effective. Different programs have dealt with this in various ways. Some create one, smaller technology working sub-committee of a larger planning body. Others create two groups: Principals (a working group) and a Constituency (larger group) for technology.

Principals: A principal group of players is the working group that will make decisions, create the plan, and move the process forward. This group needs to be small enough to be productive, but inclusive enough to build support and buy-in. It has to be diverse enough to make room for executive directors, staff managers, and a Luddite or two.

If you can't seem to narrow down the group and think you'll want to include more staff input, consider using a different method besides involvement in a group to get input. You can survey users and solicit their input directly on what they want; what works; what doesn't; what would they like to have that they don't now. This is a good way to include staff, limit the size of the tech planning group, and most importantly spot issues that may arise on the committee later.

In creating the principals, consider these words of wisdom:

- **Nerds don't necessarily make for good planners.** The first inclination of many tech planning bodies is to amass all the techies you can find and

put them in one room. Remember, your tech plan has to follow the larger strategic objectives of the statewide planning body. Unless your techies have experience in legal services and client work, they may come up with a plan that is hard to read, not based on the direction of legal services, and be amateur. An advocate with some good experience in legal services who understands technology (or is not afraid of it) is essential to the success of this group.

- **Don't fear the Luddites.** Many of us despise technology for its own sake. Don't fear these people. There will always be a tension that legal aid programs need to address: for every dollar spent on computers, a dollar could have been spent on an attorney, paralegal, intake worker, etc. In a world of scarce funding for legal aid, you'll need to justify any technology you recommend as actually enhancing service to the poor. Any hint of a "Technology Wish List" in your plan will render it un-credible in a larger planning process and may kill it. One way to ensure your plan actually meets the objectives of improving services to the poor and increasing staff efficiency is to include well-known technology

naysayers in your group. They bring a grounding effect to the excitement of technology efforts. (It will be important, however, to guard against spending every meeting defending technology in general.)

- **Leaders, Hardcore Techie, and Ambassadors.** While not every group needs all of these roles covered, a group will work more strongly if the power of three's is observed.

  First, every group needs a heavy – a *Leader*. S/He is well-respected in legal services and provides leadership to the group. S/He is involved in planning at a statewide level for the delivery of legal services <u>and</u> understands funding issues and politics. This person is versed in the gaps in the delivery systems and can help make decisions happen. A Leader may be one person or team of persons, likely an Executive Director.

  Second, there is the **Hardcore Techie**. As much as you don't want a gaggle of these in your group, you do need at least one. Get over that fact this kid is younger than (and may even be dating) your son. Inexperience in life won't hurt the techie for your purposes - others in the group will more than make up for that. But, a hardcore techie who understands the technology - the practicalities and the possibilities - is worth her weight in Itanium 2 processors. These days you should be able to find a couple of these on staff in your constituency; whether in a legal aid program, the bar, related government agencies, or a private firm. Note: Your hardcore or even administrator should not be a vendor and should not be married to a vendor.

  Lastly, every group needs an *Ambassador* – part catalyst, part-

facilitator. The ambassador inspires the team to move ahead and keep to task, reigns in ideological debates, pushes through bureaucracy, translates opinions, and smoothes the discussion. With any luck, this person(s) deliver the group to its best dynamic.

The Constituency: Also known as stakeholders, the Constituency group Is comprised of those who have a measurable interest in the technology planning process. They are involved in larger, less regular meetings. Their input is sought on larger issues and main planning milestones. See Who is in the Group for more information on who forms a constituency.

Convening the Group

A kick-off meeting is usually a good way to start an effort. States have used the following approaches to convene meetings across distances:

- **Statewide (Technology) Conference**: Invite representatives from the chosen constituencies to a one or two day conference or event. A key component of the conference could be the initial meeting of the planning group.
- **Statewide (Technology) Taskforce**: A one-day meeting that invites the attendees to begin charting the course of your planning efforts is also effective.

Staffing and Budgeting for the Planning Process

There are as many options to staff the planning process as there are plans. Full-time, part-time. Consultant or staff. Staff with a new job description. New hire. And our favorite: staff with same

job description. What you will ultimately need to help you plan will depend on your situation and the resources devoted to the effort by the committee.

Staffing

Everyone has the best intentions, but we're already overworked. You can see from the Sidebar that many programs used a volunteer committee to plan. In most of these interviews, however, it was clear that there was a "someone" – one person whose job description changed in order to make time to manage the planning process. A purely volunteer effort can make meeting deadlines nearly impossible.

> **Pearl of Wisdom:**
>
> *"Our planning process has been very successful until this point where we now need to actually identify specific technical recommendations to meet our objectives. The lesson learned for us is to use outside help in this area when we need it."*

Whether done by a staff person whose responsibilities change to include this new project or by a paid consultant, you need a sparkplug to ignite the group and keep it moving. While the rest of the committee can volunteer, one person who is paid or recognized as being responsible for the process should be designated to draft the plan, circulate it for comment, incorporate the comments, and convene the meetings. Depending on the state planning effort and politics, this does not need to be a full-time job.

Words of Wisdom About Consultants

A planning consultant and/or a technology consultant can be useful to a committee that lacks expertise in a certain area and/or needs facilitated discussions. Alternately, a technology consultant can be used at key points to help provide guidance and options to a committee that

has articulated the goals of technology. For example, many executive directors know a bit about technology, but are not familiar with tech concepts. It is great for them to come up with specific goals, but when it comes down to specific technology recommendations, you likely will need a technology person to provide that input. Outside consultants are an obvious choice for those groups who can't find this expertise among internal staff members. A word of advice: Outside consultants are used to dealing with for-profit companies with large budgets. Make sure you find someone who knows the non-profit arena and knows not to "shoot for the stars." A good place to start looking for a consultant is the National Technology Assistance Project (`http://lstech.org/ntap`), the LStech.Org listserv (`lstech@lstech.org`), and other non-profit consultant email lists, such as Riders and Compumentor (See Appendices for more information).

Budgeting for the Process

Planning takes time and money. You'll need to do a simple planning budget. One of the first orders of business will be to determine how much is needed to help staff the process and potentially afford outside help in finite, select times. These resource allocations can be "soft" expenditures (e.g. Program X will staff the committee with administrative support) or "hard" expenditures (e.g. Program Y will pay out-of-pocket for the conference calls, or $300 is needed by each partner to pay for an outside consultant). A commitment will be needed by all programs to fund and complete the planning phase of statewide technology support. If your committee does not fully understand the value of this investment, consider other phases of the checklist first (i.e. Mission and Vision of Committee and Assessing the Value of Technology). Items to include in

your budgeting process include: staffing, administrative support and coordination, conference calls and meetings, travel or transportation expenses, consultants, and other (copies, etc.).

The Mission and Vision of the Group: Assess the Value of Technology

Planning is not an end unto itself; it must be with purpose. To ensure that serving the poor drives your technology plan, you have to give some thought to: goals first, needs second, technology third.

"Mission and Vision?" These words alone

can make a committee groan. But, for a technology planning committee in a legal services setting, it is an important step toward effective planning. Your group is comprised of many people who define technology differently and who

understand it at varying degrees. We recommend four basic approaches to lay the groundwork for buy-in, align the group toward the same goals, and ensure the planning body understands the importance of the work.

1. Outline the Responsibilities of the Committee: Make sure everyone knows what needs to get done and in what timeframe. Generally, responsibilities of a planning committee are to:

- Create a plan for the Statewide Tech Support and Training and/or to help Join Merging Programs,

- Include technology objectives within that plan that integrate technology with larger goals around service delivery,

- Provide the braintrust for the initial Implementation of the Plan (staffing, hiring, and oversight), and

- Evaluate the progress of the plan and the end product.

2. Define Technology: Your committee should be on the same page about what technology means in relation to the planning. The plan should include the definition you come up with. You can likely borrow from *TechSoup's* definition or use it as a starting point:

"Technology is understood comprehensively to include purchases, leases, maintenance, training, and supporting supplies in the electronic information technologies encompassing: 1) interactive telecommunications equipment, 2) computers and related materials, copying machines, telecommunications equipment, and other non-instructional equipment, and 3) assistive technology or equipment for instructional programs."

3. Assess the Value of Technology: Assessing the relative value of a certain technology tool or strategy is complex. Ultimately, to assess the full value of technology, a program or collaborative of programs must be able to describe the benefit to the organization in terms framed by its mission, strategy and program. Without a specific understanding of how technology can help your organization or your state justice community to achieve its unique mission, it will be difficult to make the right strategic and purchasing decisions.

Consider the following questions to help you think more methodically about value of technology:

- How can improved information and communications create new opportunities that improve our ability to advocate for our clients? Litigate, negotiate, represent? Provide information?

- How can partnerships and collaboration be strengthened using technology for the benefit of our clients? For improved efficiencies and economies of scale?

- How can technology improve our programs' visibility to our clients,

funders, and other partners?

- How can technology increase our efficiencies locally and maximize existing resources across the state?

- How can technology help deliver more services to clients? Help advocates manage their cases?

- How can technology help streamline paperwork, administration, reporting requirements, and other similar activities?

4. Develop a Simple Mission and Vision: We're not experts on mission or vision statements. There are as many sample and variations as there are people. But, the basics are straight-forward. The mission statement of the organization should include purpose, constituents served/ targeted populations, and services. It should reference larger missions of your justice community to help low-income persons. A sample is included:

> **Sample Mission of Tech Planning Committee**: Develop, oversee implementation of, and coordinate relevant technology plans and initiatives to fulfill the vision.

> **Sample Vision**: Ensure access for low and moderate-income residents to the civil justice system through high quality legal services and self-help opportunities.

Assess What You Have and Define What You Need

Now, it's time for the nitty-gritty. No more big picture and abstractions. To plan for where you're headed, you have to assess what you have and what you need.

1. **A Technology Inventory:** One of the goals of most technology plans is to

equalize the opportunities afforded by technology to all programs in the state. A technology inventory helps you first identify what you have in each program across the state, what resources are available, what equipment capacity exists, what is underused, and what needs to be replaced or improved. By taking this step, you can help avoid buying redundant technologies or incompatible technologies, and you can help assess which of your current technology is obsolete.

There are several tools available for individual programs to easily do a technology inventory. TechSurveyor is an online tool powered by NPower.Org (`http://www.npower.org/techsurveyor`) that helps a program keep track of its technology and create a baseline report of what exists in an office/

Survey Says…On Visions and Goals of the Committee or Planning Process

- *"The purpose was to create a common vision about technology in the access to justice community."*

- *"The theoretical purpose was to allow the merging entities and others to exchange information and data."*

- *"The purpose was a bit of a struggle. One group wanted to focus on cutting edge technologies for the future. Another group wanted to start with the fundamentals. There was always a tension around the implication of spending money on technology: are we taking away money for lawyers and lawyering?"*

- *"In the beginning, we looked at each other's tech plans and saw that they were very specific with technology, but didn't have a vision piece that was important to us. What we wanted was a shared vision and have an agreed-upon plan for achieving that."*

program. It offers a simplistic Check-Up to help a program correct obvious deficiencies.

Additionally, if you prefer the manual version, *TechSoup* (`http://www.techsoup.org`) has several articles that outline step-by-step, what hardware and software to inventory and what information to capture.

Whether your committee elects to implement an inventory among programs using these methods or your own, each program should inventory existing hardware, software, Internet service, networks, and other tech equipment (video conferencing technology, etc.). This list should outline what needs to be replaced or improved.

In addition to equipment, you'll need to inventory your staff resources across the state. What technology skills does your staff have? Who do people within each office/program rely on for tech support? Who is able to trouble-shoot, install, or manage technology? (See *TechSoup* for sample Technology Organizational Assessment Worksheets, or use the online tool *TechSurveyor*.)

Lesson Learned: A Word of Caution on the Tech Inventory: This step sounds easy and innocuous. That's the point of this manual – make it seem easy. But, there are cautionary tales that might be of value to you. Technology can be a scapegoat for unresolved visions or ideas on planning or service delivery. (This is good news, by the way. If you notice something is an especially heated debate when talking about immovable objects like computers, generally a good time to realize you'll not make headway trying to decide on those immovable objects, and instead step away and

call attention to the real issue that is not being addressed.)   Something as simple as doing a technology inventory can be perceived by those who disagree with your process or technology investments suspiciously as a back-door way to "embarrass" programs, skew funding decisions, and potentially take future decision-making control away from a program that had slower computers or primitive networks due to a technology policy. Even the programs that are ahead of the curve could be suspicious that the survey could somehow divert chunks of their potential future funding away to programs that had not made the same prior investment. All this simply to say that "equalization" is not automatically seen as a good thing. But, this problem can be overcome somewhat easily if you're aware of it. Assess your political situation and be sensitive to the undertones before happily recommending a the goals of a technology inventory. If you face extreme resistance, it is best to use an NTAP consultant or outside facilitator to help your committee address the real issues at-hand and safeguard programs' fears.

2. **Define Your Needs:** You want buy-in? You want technology that actually makes better advocates? This is where you begin: a statewide *Technology Needs Survey*. If you don't want a bunch of nerds or funders telling you what you need, you need to let the people speak. A survey is a great way to assess the current state of technology in each program in your state and to find out what people think will help them be most efficient and effective in serving clients. Publishing the results of the survey

will help inform the field about the goals and plan.

Note: This does not have to be a big production: distribute the survey and tabulate the results. It shouldn't take longer than three months from receiving the survey results and writing your plan. Be warned however that if you don't integrate the results of the survey into a written plan in a timely manner, your report will be stale.

Explore Solutions

Assessing How to Integrate Technology with Your Objectives

Exploring solutions means understanding what problems need to be fixed and what options might be available to you to meet your goals and visions. You now have the mission and vision articulate. You also have a needs survey from the field. You can now outline specific technology strategies to meet objectives. Technology should not drive the decision making. Rather, decisions should be made based on the goals and needs you have outlined to improve the delivery of legal services.

> **Pearl of Wisdom**
>
> *"We spent too much time jumping into the 'how' stage, instead of starting with the 'what' and 'why' stages."*

For example, sample goals, objectives, and strategies might be:

With the vision articulated, the planning committee should be able to discuss specific goals and strategies that are specific and measurable, to achieve the vision.

Sample Mission of Tech Planning Committee: Develop, oversee implementation of, and coordinate relevant technology plans and initiatives to fulfill the vision.

Sample Vision: Ensure access for low and moderate-income residents to the civil justice system through high quality legal services and self-help opportunities.

Sample Goals:
1. Achieve technology equity among legal services and pro bono programs to enable all staff to have access to same resources and most effectively serve clients.

2. Increase capacity of infrastructure to provide equal opportunities to access legal services for rural clients.

3. Increase *pro bono* opportunities in rural communities.

4. Increase number of attorney hours spent on representation by improving efficiencies of case acceptance criteria and intake delivery systems.

5. Increase staff productivity and reduce frustration with technology that isn't working well (e.g. couldn't use case management or computer or phone system). Reduce time spent by all programs managing redundant technologies.

6. Create opportunities for clients who never enter legal assistance circles to access needed legal services from more portals and points of entry via technology.

7. Creating a stable platform from which our delivery systems

and legal services can grow and expand with changing technologies.

Sample Strategies

1. Tech Equity: Ensure a standard level of a personal computer that is linked to a printer, with desktop email capabilities and access to the Internet is available on every advocate's desk.

To help formulate these objectives, consider the problems, needs, and vision. Ask yourselves questions that help integrate technology in the solution of those problems. For example:

- How could technology be used to improve the sharing of information of cases among advocates (i.e. case management systems)?

- What educational technology or Internet services might be offered to our client community? Now and in the next five years?

- How can technology support appropriate referrals of cases to non-legal aid program partners?

- How can technology offer a portal or mechanism to encourage the timely and central distribution of advocacy training information, briefs, advocacy strategies to improve statewide advocacy coordination and efforts?

- How can technology help provide extended services to rural populations?

- Increase pro bono opportunities in rural communities. (Note: According to our interviews, there are surprising opportunities for new funding and new partnerships through collaboration with rural libraries, other rural-focused non-profits, and rural bar associations themselves.)

Spend some time looking at your goals and creating questions that help you answer how technology can help and what issues need to be addressed. Use these questions with your planning committee to explore options and solutions to existing service delivery problems. Once you have explored these topics, you can prioritize your solutions, needs, and goals according to your mission and objectives. Representatives of all stakeholders need to be involved in the process.

Develop a Concrete Plan

Once you have assessed your resources and defined your needs, the next step is to make a concrete plan for how to meet those needs. This phase of technology planning requires the most technical knowledge. If you don't have this on staff or among your team, you might consider some type of expert advice and assistance.

To actually develop a concrete plan, you'll need someone who'll actually write it and circulate it widely for review and feedback among

Pearl of Wisdom

"I think the lesson we learned was the value of a regrouping to test our assumptions about technology and our plans for it. [A regrouping lets us] see what will actually work and what won't before we implement a technology full-scale or unveil a plan to do so. [This regrouping] lets us test our assumptions, and allows others to see what is happening and helps bring people slowly on-board."

your principals and constituencies. Many resources exist in finding a consultant and developing a written product. See appendices for more information on NTAP and TechSoup's sources. Also, we provide you with some possible specific components of a written technology plan

in a later section entitled, oddly enough, *Components of Your Tech Plan.*

Re-circle the Wagons

When the plan is being written or even as first drafts are making their way to the printer, it is not yet time for celebration. Make sure you re-circle the wagons and get buy-in. Executive directors and others who have not been involved in the daily processes of planning will need

> ### Pearl of Wisdom
> *"We look for local, statewide, or corporate funders who donate equipment or make small grants. Other sources have been IOLTA funders and private foundations, especially if they participated in the planning process."*

an opportunity to comment on and become aware of intended plans. Re-circling the wagons may mean holding a larger meeting for more discussion on what you already thought you discussed. This process, while hard to stomach after so much participation, is critical. These constituencies will help allow your plan to come to fruition. They can help you assess if the plan actually will be perceived as achieving service objectives. They will also comment on whether or not it is realistic given timing, staffing, and budget constraints.

Note: We strongly encourage you to create a formal process for directors and others in your constituency to officially review and

> ### Pearl of Wisdom
> *"Don't forget about other community partners! Many interviewed noted that direct collaboration with other non-legal aid partners, like senior centers, domestic violence shelters, rural libraries, and other social service agencies receive positive funder response, especially from locally based community foundations."*

comment on your plan. But, don't make the "Re-circling of the Wagons" step the first opportunity for them to do so. Your planning process will have much better success if this is not the only time you get buy-in from these folks. Re-circling the wagons needs to happen along the way with every major draft. Doing so will allow your final meeting to be cause for modest and enjoyable review, not painful debate, or even worse, gutting.

Funding and Sustainability

Technology plans are activated by funding, and your partners are key. The more impact these plans have on improving the service delivery system of the state, the more

> ### Pearl of Wisdom
> *"Sustainability means building technology into the budget. We don't do separate fundraising for it; it is just a built-in part of doing business. For the statewide website, however, we approach that differently. We have several other entities that come to the table and join together to seek out funding options. We look at the state filing fee surcharge to help support this." – Tim Kelso, Nebraska.*

willing most funders will be to support the effort. Foundations, private technology companies, and the private bar are all obvious starts for fundraising. Your technology committee and the larger state planning body should also brainstorm its contacts and fundraising opportunities available through its contacts. Many interviewed were successful in receiving awards or grants from state bar foundations, IOLTA grants, Legal Services Corporation, and private foundation grants.

Develop an Action Plan

So, you have a plan and you have identified how to support it. We're now at a critical point of departure – either the great plan gets celebrated amongst friends and then {gasp} filed away! OR it gets implemented. You need to keep the group's momentum to ensure you create an Action Plan that outlines how you will staff the effort, ensure timelines are met, and that results are seen. Developing a full-scale action plan can be the first responsibility of someone you hire to implement it. The best decisions your committee can make at this point are on: staffing, priorities, and phases.

Staffing the Action Plan

This is different from staffing the planning process. In the planning process you need someone who is great with people, a good organizer, understands the issues of executive directors and translates tech, and most importantly, can inspire a group to succeed in planning. Now, you need someone who staffs the plan. They know more about technology and can make decisions to implement actual networks, and oversee other purchasing, installation, and design of systems. They are responsible for ensuring training happens, support is delivered, and a statewide technology plan is phased and rolled out.

There are many staffing options: full-time devoted staff support to planning and implementation; part-time staff support; in-kind support. The right answer will depend on whether you are a one-program or multi-program state, your plan objectives and timeline, your funding, and your priorities.

Full consideration is needed when deciding whether or not to outsource the technology services and maintenance or

whether a planning committee elects to build the systems and have the technology expertise in-house. Generally in larger organizations, it might be more cost effective to outsource, given the number and type of technologies included and the geographic area to be covered. If your committee needs help in determining the best staffing, let an NTAP consultant help you tailor your plan to the staffing you'll best need.

If you're hiring a Coordinator to be the state technology support after the plan is drafted, you might need a different person than before. These responsibilities include: carrying out the plan, establishing networks, overseeing purchases, training, and installations; managing CRPs across the state; and recommending best technology options to meet the objectives in the plan. For this position, you can hire a techie or a legal-aider. See LStech.Org for sample job descriptions (`http://`

`lstech.org/jobs`) for sample statewide tech job descriptions). See sidebar for one program's advice.

Responsibilities of a Technology Coordinator

If you're hiring a statewide tech coordinator, pay close attention to your job description. If you need someone in the early stages of planning and convening constituencies and principals, focus your hiring strategy on getting someone who is NOT a techie, but instead a manager of people and projects. This person will need a gift of facilitation, credibility in the legal aid community, and understanding of client service objectives, and the ability to bridge different viewpoints from techie to ED. Someone from the legal aid community works great in these positions. They should have a comfort with technology, but certainly doesn't need to be a geek, nerd, or even MS-Certified.

Evaluate Your Efforts

A lot has been written about evaluation of projects and its importance. We're here simply to tell you that it is important especially with technology in order to gauge your success and apply for future funding. It helps justify to Luddites the power of these investments, and helps reign in the techie's shopping spree by holding it accountable to improving your state's services and efficiencies. We have provided in the appendices an excerpt from Minnesota's School and Libraries Technology Planning resources that describes potential processes and the value of evaluating these types of technology planning efforts specifically. Also, look for references to general evaluation resources on LStech.Org (`http://lstech.org`) and at TechSoup (`http://www.techsoup.org`).

Pearl of Wisdom

"When hiring a Statewide Technology Coordinator, you'd like someone who has actually worked in a legal services office and has strong technology skills. However, if forced to chose between legal services experience and tech skills I'd recommend your first hire be a legal services person. You can always bring in a "real" techie with your second hire, pull from your volunteer pool or as a consultant. You should also clearly define this role and responsibilities and publicize it to the field. One or even a handful of people cannot provide all the technology support needed in the field so be careful to define the limits."

Appendices

Components of Your Tech Plan

The tech plan is really a product of your committee's work. We have provided some possible plan components based on those we reviewed. You can mix and match to meet the needs of your state. Also, remember that you'll need to prioritize and likely implement in phases.

Components At-A-Glance

- Staffing State Technology Support
    - State Support Entity or Outsourced Help
    - CRPs in every office
    - On-Going Technology Steering Committee
- Technology Equity: Minimum Hardware and Software Standards for all Offices
- Communication Infrastructure
    - Internet access for all employees from desktop
    - Email accounts for all
    - Statewide website for advocates
- Improved Case Handling and Maintenance on Advocacy Software:
    - Standard Case Management System for Programs in State
    - Statewide website for advocates (see above)
- Training
    - CRPs
    - Users
    - Staffing for Training
- Group Purchasing
- Program Technology Planning, Policy, and Budgeting
    - Plans for disaster, security
    - Policies for computer use, maintenance, upgrades, and help
    - Budgeting, inventories, and future planning
- Improved Services to Clients
    - Statewide website for clients
    - Self-help technologies or assisted self help services using technology

> ## Pearl of Wisdom on Key Components of a Tech Plan
>
> *"The first piece is to clearly identify what it is you are trying to accomplish. And that needs to be done in as much detail as possible. I think the reason for that is that things can take on a life of their own. Unless you have a clearly defined goal, these things can go a-field and you will end up spending a lot of money. Another key component to the process is that initial decisions should be made as to which programs you are wedded to and design systems accordingly. You cannot have a system and then find out it is incompatible with your case management system."*

State Technology Support Structure

Statewide Technology Support Staff
There are several options for this position: in-house or outsource. See *Develop an Action Plan* for sidebar notes and comments on staffing this position. If you have some sort of state support entity in your state consider housing your statewide tech support staff here or at a field program. You want the person to be as connected to the field as possible.

Some states have chosen a more centralized support model that delivers a full range of tech support (i.e. system administration, help desk, tech purchasing, etc.) from an in-house centralized entity. Consider consulting with Legal Services of New Jersey or reviewing their plan if you favor this option. Others, like Nebraska, have chosen to outsource most of the tech support function and found this cost effective. See sidebar on *Develop an Action Plan.*

2. CRP in Every Office Because you cannot hope to meet all the technology support needs centrally, your plan should call for the establishment of a network of local Computer Responsible Persons (CRPs). A CRP is the staff person, designated by the program, who serves as the front-line of support on statewide technology initiatives and attends technology taskforce meetings and trainings on behalf of the office. This may be an advocate, support staff, or real tech support person (if an office has the luxury of having one on staff), but should be someone that isn't afraid of computers.

3. Periodic CRP Meeting Gathering the CRPs for training, updates, and feedback on initiatives at least quarterly will be often necessary in meeting the goals of the technology plan.

4. On-going Technology Steering Committee Consider having an oversight entity to provide accountability and provide input on the progress of your plan to keep it fresh. The composition should be similar the initial planning group if not a little smaller. This group meets regularly to track progress of, and provide input on, tech initiatives. This group will also report to the field and do future planning.

Minimum Hardware and Software Standards for all Programs
In your tech action plan, you'll need to agree on a minimum set of hardware and software necessary to carry out your objectives. The action plan would then outline a phased approach to ensure that all programs meet that standard. This doesn't necessarily mean buying programs a lot of hardware and software. Meeting the minimum standards could be required for their participation (receipt of funding) in other funded projects. As part of this process, each program will likely need to do, or already have done, their own individual technology inventory. (See *Assess What You Have.*)

Communication Infrastructure

1. Internet Access for all Employees at their Desktop Almost all offices now have some form of Internet access, but – depending on the needs of the office – not all access is meaningful. Some still depend on dial-up access and this may be too slow to encourage communication or information exchange. Most action plans devise an approach to bring meaningful internet to every office.

For more information on broadband, Wide Area Networks, Virtual Private Networks, Application Service Providers, and other networking issues that may affect these discussions, you can elect to bring in a consultant, call or email NTAP for help, or consult online resources at LStech.org (`http://lstech.org`). Some of these options also provide an avenue for case management data sharing among offices within a program.

2. Email Accounts for All The value of email as communication tool hardly needs to be explained. For email use to be meaningful, it must be available at the desktop, and each staff must have their own account. Statewide email accounts for all staff is easily and cheaply attainable once Internet access is in place in every office. Options here include hosting your own statewide email/web server or renting the service from a web hosting company.

3. Statewide Website A statewide website is tool to improve inter-program resource sharing. It is the perfect way to provide general statewide support because you make information available via everyone's desktop 24 hours a day, 7 days a week. Statewide websites also centralize information for advocates on brief banks, processes, advocacy strategies, information on other programs and services, and notices of trainings and other professional development opportunities. LSC TIG grants have been awarded to at least 47 states and territories to help kickstart statewide websites that are built on one of two templates. Every statewide tech plan should include a component to get all programs involved in these sites and plan for future sustainability and sufficient staffing of this initiative to deliver meaningful content. See `http://lstech.org/resource_lib/web_dev/statewide_templates` for contact

information on the web site coordinator in your state.

Statewide Case Management Software (CMS) Standard

All legal services programs have a need for an effective case management system to assist staff and pro bono attorneys in collecting, managing, utilizing, and reporting on client and case information. The theory is that by agreeing to use one version of a CMS package in a state, you gain by improving the economies of scale. For example, if a statewide funder requires a new statistical report, it only needs to be written once in order for it to be shared by all programs using the software. You could also develop the substantive features of case management (like substantive intake questions or form pleadings) once, and share costs among the programs.

The theory makes sense, but getting all programs in your state to agree on a preferred case management package could be as challenging as herding cats. A few tips:

1. Although a clear preference has emerged among legal services providers across the country (Kemp's), you may need to put as much effort into picking the software as you do in implementing and supporting it. You may need to pilot a few choices for a few months and then make a recommendation. Do not forget factors such as training staff on a new system, reporting features and capability, and software costs and changes. (A report is about to be released through the Legal Aid Society of East Tennessee that reviews existing CMS programs. Look for it

on LStech.org when considering a change.)

2. Think long and hard before trying to develop your own CMS for the state. None of the current options are perfect, but developing software takes many, many hours and much money. Many have tried this option over the years. Few of these versions still remain. One program who is one of the lone survivors simply states that if they knew now what they didn't know then, they would not have chosen that option. .

For more information on deciding what system is right for you, please see materials on LStech.Org at `http://lstech.org/ resource_lib/software/case_manage`, and `http://lstech.org/ntap/trainings`.

Training

A successful technology plan must consider some degree of training for both CRPs and users. Tech support that is housed at a state support entity can help provide logistical support for the training because they are staffed to do it in other areas.

1. CRPs If you want local CRPs to be the first line of support for your plan (and you do want this – desperately), you have to train them. They are easy to train because you can work a training component into your periodic statewide CRP meeting or hold an annual statewide tech conference as some states do.

2. Users Most end users are harder to get to tech trainings. You can try tacking tech training on to the beginning or end of other substantive training events that advocates usually attend. Another more costly (for trainers) approach that is more

likely to succeed is to go to the advocates and users themselves. Try to schedule on-site training for staff when you are out in the field doing an installation or support.

3. Staffing Presumably statewide tech support can handle a large part of either conducting the training or arranging for outside trainers. However, don't assume that just because someone knows the technology, they can train it. Techies are notoriously bad trainers. Especially for training staff and users of technology, we recommend choosing an advocate who has a basic understanding of the technology over a techie eight times out of ten.

Group Purchasing

From computer assisted legal research (Westlaw or Lexis) to communications infrastructure to desktop computers, a number of states have found there is purchasing power in numbers. However, this just doesn't happen on its own. It takes considerable effort to organize programs and then negotiate with vendors. This effort needs to be adequately staffed and could be included as part of the job description of a statewide tech coordinator. Be sure and start with something easy like desktops before you tackle something like communications infrastructure. Check LStech.Org for recent news on any discounts that may have been negotiated nationally (e.g. Citrix).

Program Technology Planning, Budgeting and Policy

You can only move along at the lowest common denominator. In order to

meaningfully participate in your plan, programs need to get their own ducks in a row locally. This means, they should adopt their own tech plan and budget, which ensures integration of the statewide plan at a program level. Most programs don't have these and could use some help getting there first one in place. There are a number of planning and budgeting tools out there, but training and assistance will go along way to making this happen. See *TechSoup, NPower, LStech.Org, and NTAP for help on individual tech plans for offices and programs.*

In addition, at a statewide level and local level, you'll need to develop strategies to have secure relay of information, ease of operation post-disaster, and protocols for how to maintain and upgrade equipment. Involving staff at the local level on these types of protocol developments will also enable your state support to identify technical areas that need to be planned for in the future.

Self-help Technologies / Client-Focused Technologies

While many programs do not invest in client focused technologies in the early phases of state technology planning, it is a critical piece to a statewide technology plan. Trends from the 2000 U.S. Census suggest that 25% of our client community already uses the Internet and that low-income persons are the fastest-growing users on the Internet. As more and more government applications, services, and economic opportunities are available online, legal services has a responsibility to offer its services easily to clients over the Internet; to ensure that material created for the Internet is usable by our client community; and advocate for our clients to be given access to the Internet and the economic opportunities it more and more affords.

There are several approaches to using technology to provide help to clients with their legal needs.

Statewide Websites As explained above, statewide websites act as a portal for clients, and can provide them with a repository for legal information, referral, and general assistance online. There is a myriad of material available for statewide website coordinators on content development for clients. For more information on these websites, visit `http://lstech.org` and `http://lstech.org/ntap/trainings`.

Self Help Systems Document assembly systems, like I-CAN!™ or those being created using Hotdocs©, allow users to answer simple questions and complete court proceedings. For more information on these systems, visit LStech.Org (http://lstech.org) and Legal Aid Society of

Orange County's I-CAN!™ site (`http://www.legal-aid.com`).

LiveJustice and Internet Chat
Massachusetts has piloted a legal chat for clients online, where – after completing an online application – users can get legal help on their problem through chatting with an advocate.

These are some starters. Other programs have developed other types of plans to improve or expand self help services through technology. Contact NTAP for more assistance or referral to other pioneers in this effort.

Resources, Links, and Contacts

Background or Materials on Technology in Legal Services

- `http://lstech.org/resource_lib/tech_manage/future`
- *Future of Technology in Legal Services,* Gabrielle Hammond and Ellis Jacobs
- *Equal Justice and the Digital Revolution,* Julia Gordon (Project for the Future of Equal Justice)
- *LS Technology for Newbies,* Steve Gray `http://lstech.org/lstech_101/l`

Technology Inventory and Planning for Individual Programs

- *LStech.Org* `http://lstech.org/resource_lib/tech_manage/plan_policy`
- *NPower TechSurveyor* `http://techsurveyor.npower.org/techsurveyor/`
- *TechSoup Tech Inventory* `http://www.techsoup.org`

Technology Needs Assessment Samples

- *Tech Soup* `http://www.techsoup.org/howto/worksheets.cfm?topicid=11`

Technology Planning of Minnesota Schools and Libraries

- `http://informns.k12.mn.us/techplan/`

Consultant Query or Find

- National Technology Assistance Project `g.hammond@verizon.net`
- LStech.Org `http://lstech.org/resource_lib/tech_manage/hiring_consult`
- *LStech email list* `lstech@lstech.org`
- *Riders and Compumentor email list* `riders@npogroups.org`
- *TechSoup* `http://www.techsoup.org`

Budgeting for Technology

- LStech.Org `http://lstech.org/resource_lib/tech_manage/plan_policy`
- *TechSoup* `http://www.techsoup.org`

Sample Job Descriptions for Statewide Technology Coordinators

- LStech.Org's Tech Library `http://lstech.org/ntap/tech_topics/plan_policy/sample_plans`

Interview Contacts and Information from Colleagues:

- **Ray Bollinger**, Legal Aid Society of East Tennessee
  `rbollinger@laet.org`

- **Angela Campbell**, Kentucky Legal Aid
  `acampbell@klaid.org`

- **Brenda Combs**, Northern Kentucky Legal Aid Society
  `bcombs@nklas.org`

- **Rob Davies,** Legal Services of New Jersey
  `rdavies@lsnj.org`

- **Jim Deming**, Tennessee Alliance for Legal Services

- **Clarence Franklin**, North Mississippi Rural Services
  `chfrank@nmrls.com`

- **Steve Gray,** LStech.Org
  `grange@umich.edu`

- **Gabrielle Hammond,** NTAP
  `g.hammond@verizon.net`

- **Tim Kelso**, Nebraska Legal Services
  `tkelso@nebls.com`

- **Nancy Kleeman**, Minnesota State Bar Association
  `nkleeman@statebar.gen.mn.us`

- **Joan Kleinberg**, Northwest Justice Project
  `joank@nwjustice.org`

- **Ed Marks**, Advocates for Basic Legal Equality, Inc.
  `emarks@ablelaw.org`

- **Maureen O'Connell**, Minnesota Legal Svcs Coalition
  `maureeno@mnlsap.org`

- **Glenn Rawdon,** Legal Services Corporation
  `grawdon@lsc.gov`

- **James Spencer**, Legal Services of East Missouri
  `James.Spencer@lsmo.org`

- **Rick Winder**, Michigan State Bar Foundation
  `rwinder@msbf.org`

Sample Technology Plans
Online Versions

- **Michigan**
    - `http://www.msbf.org; www.msbf.org/legal_tech`
    - `http://www.mplp.org/techpage.shtm`
    - `http://www.mplp.org/LSCC/lscc.htm`
    - `http://www.mplp.org/taskforces/crptfpage.shtm`
- **Tennessee**
    - `http://www.tals.org/Home/PublicWeb/About/StatePlanOct2002.pdf`

Hard Copy: (available through program contact listed in Resources):

- Kentucky
- Minnesota
- Missouri
- Nebraska
- New Jersey
- Ohio
- Washington